



Employee Self-Service Job Aid

ESS How to Update Dependent Information

Topic Overview

The purpose of this Job Aid is to walk through the process on how to view, add, and update dependent information in Cardinal using Employee Self-Service.

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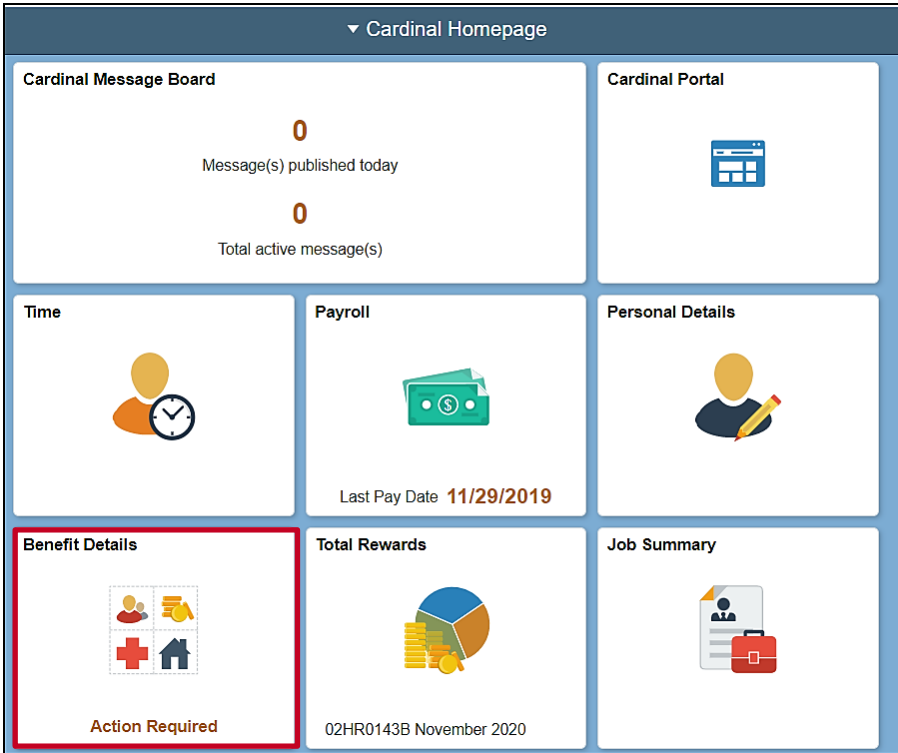
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Updating Dependent Information

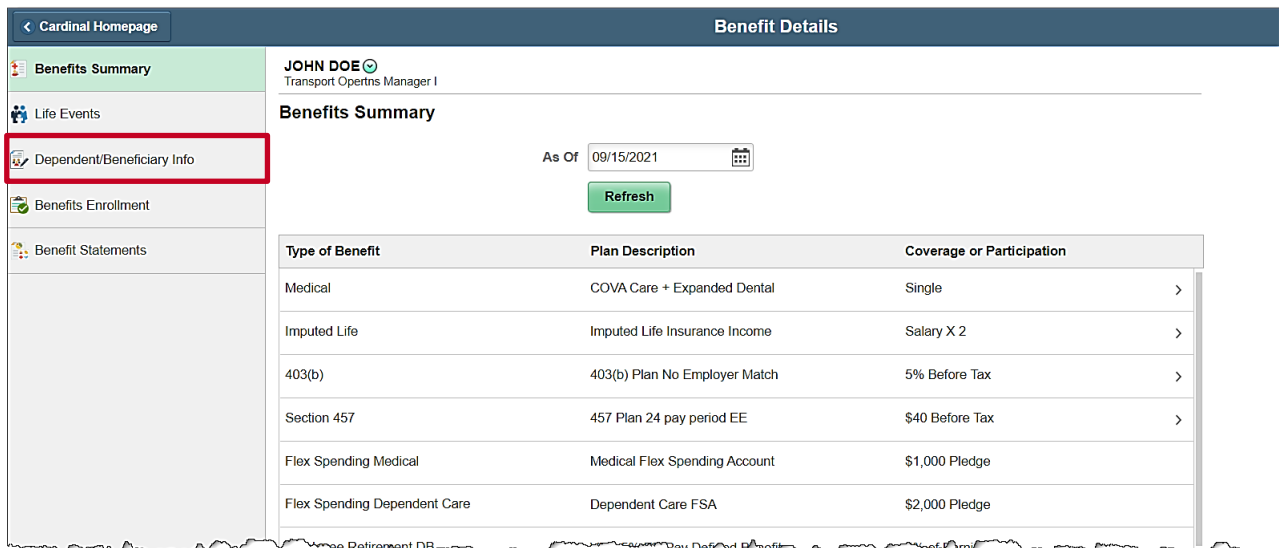
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



2. Click the **Benefit Details** tile.

The **Benefits Details** page displays with the **Benefits Summary** tab displayed by default.



3. Click **Dependent/Beneficiary Info** list item to view associated dependent/beneficiary information.



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The **Dependent/Beneficiary Info** page displays.

Name	Relationship	Beneficiary	Dependent
Pink Doe	Child	✓	✓
Jerry Doe	Child	✓	✓

4. Click on the corresponding row to view or edit the information for a listed dependent.

Note: Information updates initiated from this page do not influence benefit enrollment selection(s). Updates performed only update the personal information for the specific dependent in Cardinal. If a Dependent(s) needs to be added, the employee must do so through a Life Event.

The **Individual Dependent/Beneficiary Information** page displays for the corresponding dependent.

Cancel Individual Dependent/Beneficiary Information Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Sep 15, 2021.

Name
Pink Doe

Personal Information

Date of Birth 04/05/2021
*Gender Female
*Relationship to Employee Child
*Marital Status Single
*Student No
*Disabled No
*Smoker Non Smoker

Address
Address Address Type Same as mine
400 MAIN ST

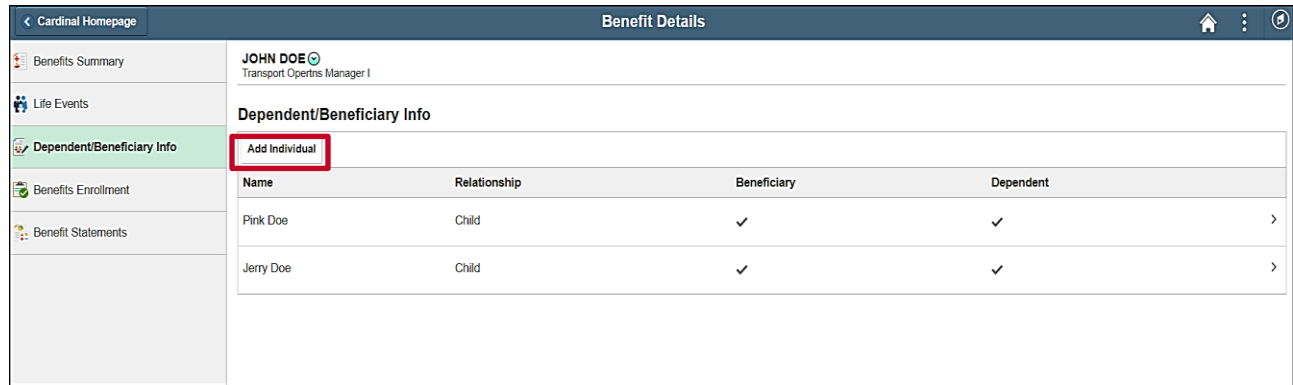
5. Review the information and make updates as desired/needed. The fields that can be updated include:
- Name Change
 - Marital Status
 - If the Dependent is a student
 - If the Dependent has a Disability
 - Smoker or Non-Smoker
 - Change in Address
 - Change/Add a Phone Number
 - Change/Add an Email

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- Once all updates are complete, click the **Save** button.

Note: The Benefits Administrator will be notified when changes are made to a dependent's profile and will inform the employee if the change impacts current benefits enrollment and/or if additional documentation is needed.

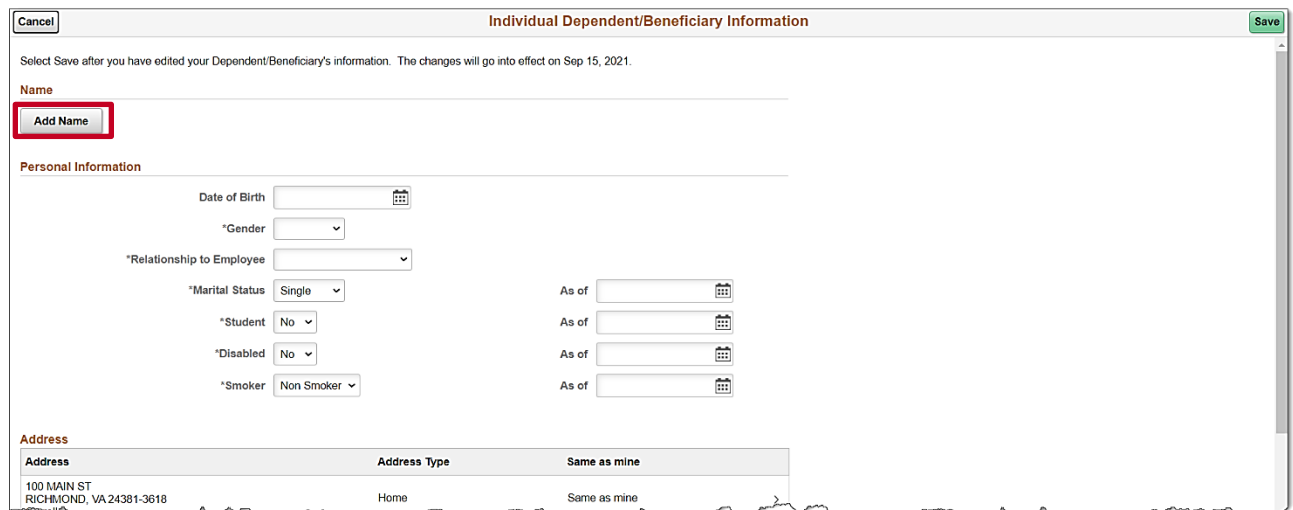
The **Dependent/Beneficiary Info** page returns.



Name	Relationship	Beneficiary	Dependent
Pink Doe	Child	✓	✓
Jerry Doe	Child	✓	✓

- To add a dependent, click the **Add Individual** button.

A blank **Individual Dependent/Beneficiary Information** page displays.



Individual Dependent/Beneficiary Information

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Sep 15, 2021.

Name

Add Name

Personal Information

Date of Birth:

*Gender:

*Relationship to Employee:

*Marital Status:

*Student:

*Disabled:

*Smoker:

As of:

As of:

As of:

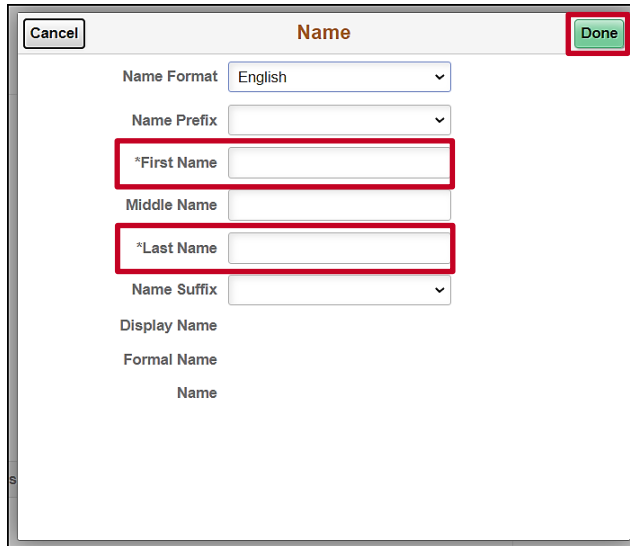
As of:

Address

Address	Address Type	Same as mine
100 MAIN ST RICHMOND, VA 24381-3618	Home	Same as mine

- Click the **Add Name** button.

The **Name** page displays in a pop-up window.

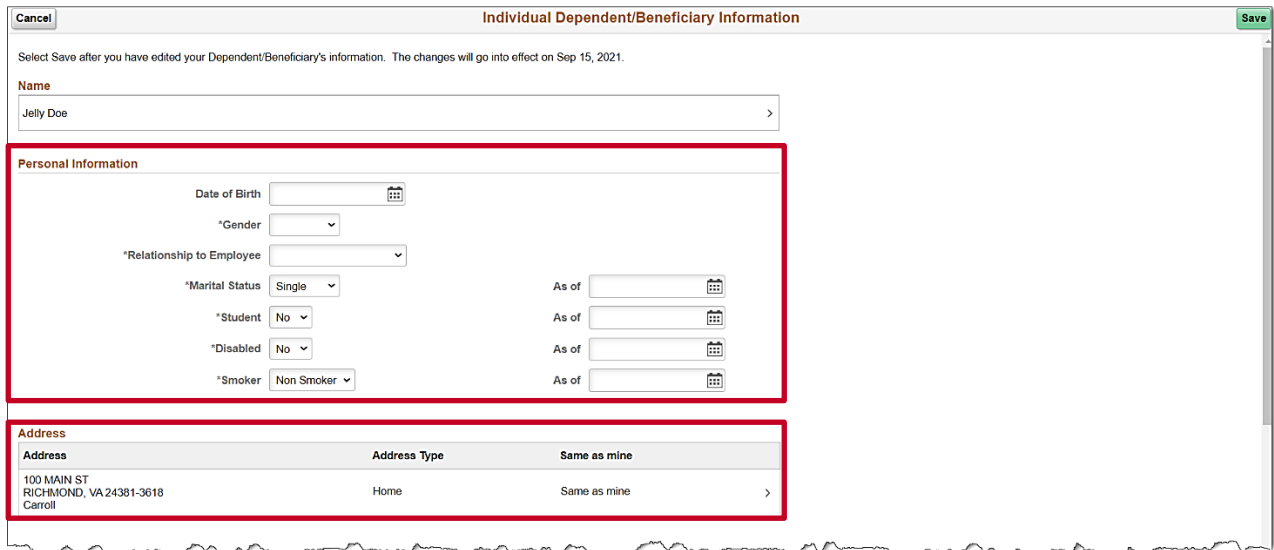


- Enter the **First Name** and **Last Name** for the dependent.

Note: Optionally add the dependent's name prefix, middle name or name suffix, as applicable.

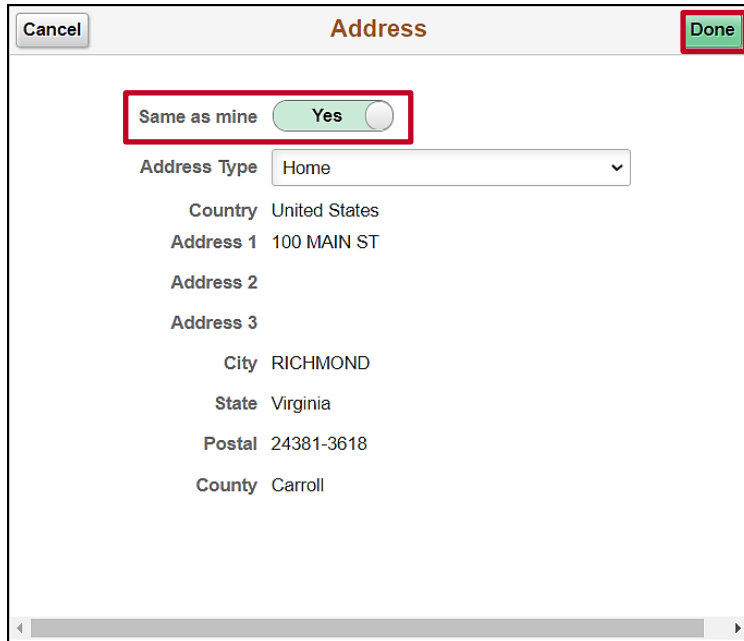
- Click the **Done** button.

The **Individual Dependent/Beneficiary** Information page returns.



- Within the **Personal Information** section, complete the **Date of Birth**, **Gender**, and **Relationship to Employee** fields.
- Click on the **Address** listed.

The **Address** page displays in a pop-up window.



13. If the dependent's address is the same as yours, leave the defaulted **Same as Mine** address. If the dependent resides at a different address, uncheck the **Same as Mine** button and enter the dependent's address.
14. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.



Address	Address Type	Same as mine
100 MAIN ST RICHMOND, VA 24381-3618 Carroll	Home	Same as mine >

National ID

No data exists

Add National ID

Phone

No data exists

Add Phone

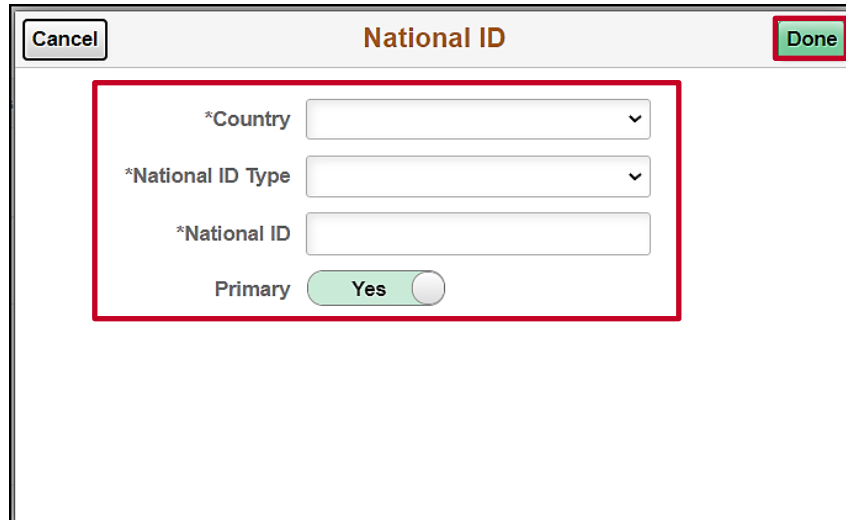
Email

No data exists

Add Email

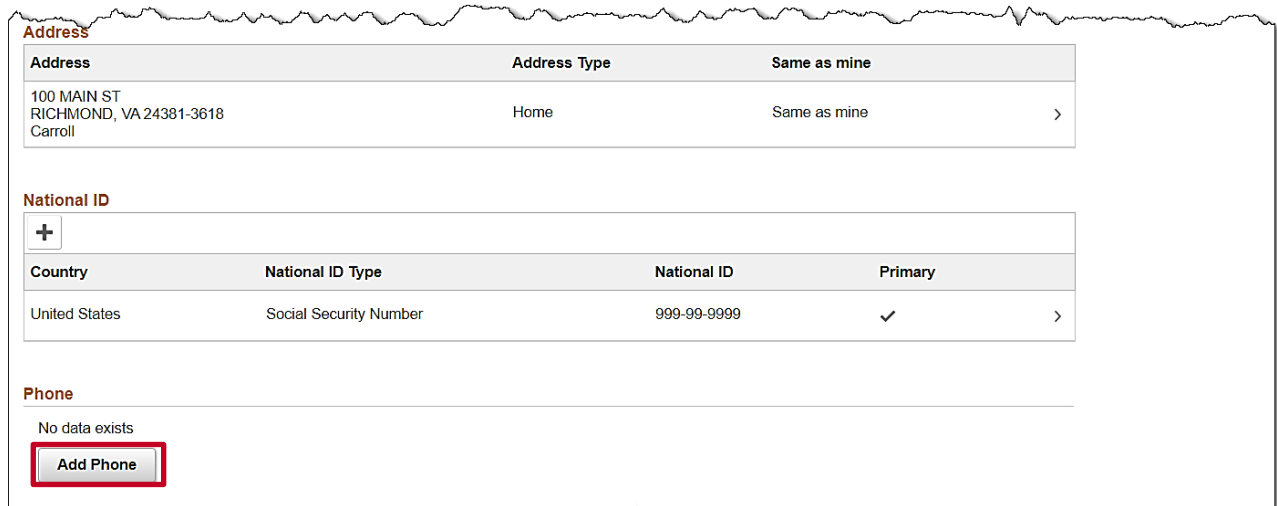
15. Click the **Add National ID** button.

The **National ID** page displays in a pop-up window.



16. Complete the **Country**, **National ID Type**, and **National ID** fields for the dependent.
17. Click the **Done** button.

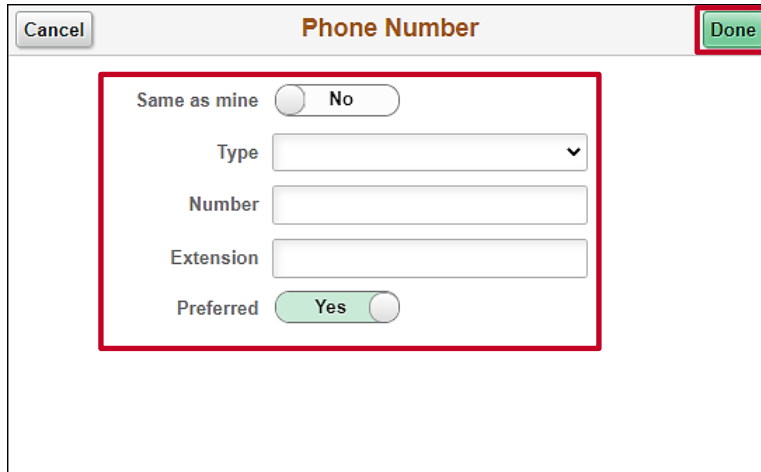
The **Individual Dependent/Beneficiary** Information page returns.



18. Click the **Add Phone** button.

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The **Phone Number** page displays in a pop-up window.



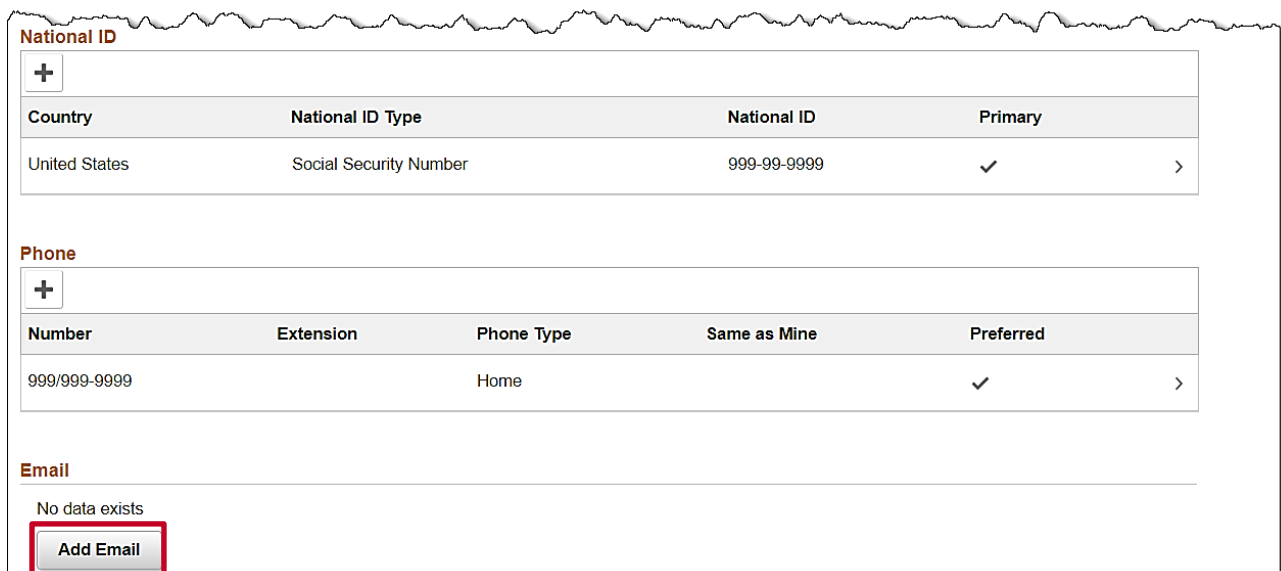
A pop-up window titled "Phone Number" with a "Cancel" button on the left and a "Done" button on the right. Inside the window, there is a red rectangular box containing the following fields:

- "Same as mine" with a toggle switch set to "No".
- "Type" with a dropdown menu.
- "Number" with a text input field.
- "Extension" with a text input field.
- "Preferred" with a toggle switch set to "Yes".

19. Enter/select the appropriate information in the corresponding fields.

20. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.



The "Individual Dependent/Beneficiary Information" page shows three sections: "National ID", "Phone", and "Email".

National ID

Country	National ID Type	National ID	Primary
United States	Social Security Number	999-99-9999	✓

Phone

Number	Extension	Phone Type	Same as Mine	Preferred
999/999-9999		Home		✓

Email

No data exists

Add Email

21. Click the **Add Email** button.



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The **Email Address** page displays in a pop-up window.

Cancel **Email Address** Done

*Email Type

*Email Address

Delete

22. Select the applicable **Email Type** and enter the applicable **Email Address**.

23. Click **Done**.

The **Individual Dependent/Beneficiary Information** page returns.

Cancel **Individual Dependent/Beneficiary Information** Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Sep 15, 2021.

Name

Jelly Doe >

Personal Information

Date of Birth 09/02/2009

*Gender Female

*Relationship to Employee Child

*Marital Status Single

*Student No

*Disabled No

*Smoker Non Smoker

As of

As of

As of

As of

Address

Address

24. Click the **Save** button.



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The **Dependent/Beneficiary Info** page return with the new dependent listed.

Benefit Details			
JOHN DOE Transport Operator Manager I			
Dependent/Beneficiary Info			
Add Individual			
Name	Relationship	Beneficiary	Dependent
Pink Doe	Child	✓	✓
Jerry Doe	Child	✓	✓
Jelly Doe	Child	✓	✓

Note: Adding a dependent through Employee Self-Service only creates a profile for that Dependent in Cardinal. It does not affect benefit enrollment, nor does it get reported to the vendor. In addition, the dependent's information added on the **Dependent/Beneficiary Info** page does not populate as a possible **Emergency Contact** in the **Personal Details** page.